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ABSTRACT

This case study examined: (1) what market research is required for planning for the implementation of "Information Power: Building Partnerships for Learning," the 1998 national guidelines for effective school library media programs; (2) what issues need to be addressed and what target audiences are required to effect change, as well as how these might best be identified and reached; and (3) what the implications are of research in program implementation and staff development for the implementation of these national guidelines and standards. The American Association of School Librarians (AASL) developed a detailed plan, with more than 30 specific objectives and more than 75 target audiences, for the implementation of "Information Power." Clear delineation of responsibilities at the national, state, district and school levels was a key part of the plan. Marketing research allowed AASL to increase sources of information for planning and to report that information more clearly and consistently, to reduce error and to manage AASL's marketing program more aggressively. Research from the implementation of change and effective staff development was incorporated in the training for state coordinators. Implementation is now underway with documented achievement of the early objectives. Appendices include a planning model and a model plan for one target group (the National Association of Secondary School Principals). (Contains 13 references.) (Author/MES)

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Connecting Marketing and Implementation Research and Library Program Development

A Case Study of the Implementation of National [U.S.] Guidelines and Standards

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The American Association of School Librarians developed a detailed plan, with more than 30 specific objectives and more than 75 target audiences, for the implementation of Information Power, *the 1998 national guidelines for effective programs. Clear delineation of responsibilities at the national, state, district and school levels was a key part of the plan. Marketing research allowed the Association to increase sources of information for planning and to report that information more clearly and consistently, to reduce error and to manage the Association's marketing program more aggressively. Research from the implementation of change and effective staff development was incorporated in the training for state coordinators. Implementation is now underway with documented achievement of the early objectives.*

Introduction

In the current political and economic environment, library associations have been focusing on advocacy, recognizing that the long-term survival of libraries of all kinds is at stake. Libraries have long had a fundamental role as centers of knowledge and cultural identity and symbols of intellectual freedom but the integral role of libraries in society is being undermined by low visibility, passive community support, and the myth that books, libraries and librarians will be replaced by computer terminals and virtual connections. Although the

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public regards library services as essential, decision-makers regard them as "soft services" (Cavill, 1997).

Research shows that school libraries and teacher-librarians have a positive effect on student achievement (Haycock, 1995) yet concerns about continued school library services are also apparent. Over a two-year period, however, the American Association of School Librarians (AASL) found itself in an ideal position to develop a national advocacy plan, based on current marketing and implementation research, for the implementation of new national guidelines and standards. *Information Power: Building Partnerships for Learning* (AASL/AECT, 1998) had been three years in development to articulate the role of the library media specialist (teacher-librarian) in collaboration, technology, and leadership and to define standards for student competency in information literacy.

The need for an effective, coordinated approach to implementation of the new guidelines and standards had been identified from the outset, and library media specialists and their state associations were looking to AASL for leadership in this area.

Research Questions

(1) What market research is required for planning for the implementation of *Information Power* (AASL/AECT, 1998)?

(2) What are the issues that need to be addressed and the target audiences required to effect change? How might these best be identified and reached?

(3) What are the implications of research in program implementation and staff development for the implementation of these national guidelines and standards?

Methodology

Marketing research provides a systematic, objective approach to the development and provision of information for decision making regarding a specific marketing problem, in this case the need for library media specialists and programs. The marketing plan requires a determination of information needs and use of both primary and secondary sources.

In order to develop a coordinated approach across the country the primary source of information for gathering information and responding to draft plans was the Affiliate Assembly (AA) of the AASL. This Assembly consists of representatives of state and regional school library media associations.

The Affiliate Assembly represented both a convenience and judgement sampling whereby respondents were selected partly on the basis of the researchers' judgment. As a reference group the AA represented individuals and organizations who influence individual attitudes and behavior, that is, they provide a reference point for evaluation of one's own behavior. As leaders in their states, the representatives to the AA were opinion leaders in the profession as well as in their organizations.

Through both focused and open-ended questions in face-to-face and telephone interviews, the researchers began to define and redefine the problem, learned what further questions to ask, determined how they should be phrased, and came to understand what answers to expect. From these interviews, draft plans were developed for presentation to the Assembly.

Sources of information included professional marketing and implementation consultants, representatives of the target audiences, colleagues inside and outside the parent Association (e.g., the president of the American Library Association (ALA), the director of the ALA Public Information Office), public documents and association web sites, vendors and suppliers, and the related professional literature in staff development and training, implementation and marketing.

The main documents analyzed in the review of secondary sources of information were the Association's existing record of research through surveys of the field, literature reviews, and the expert opinion and recommendations of task forces and groups.

In marketing terms, the Association needed a strategic plan of at least five years duration with a "product relaunch" to focus on finding untapped market segments and new ways to stimulate increased understanding, support and use of school library media specialists and programs as delineated in *Information Power* (AASL/AECT, 1998). The plan would specify resource requirements, costs, expected benefits, and activities necessary to achieve the Association's goal(s).

Implementation research provided an understanding of the common elements for furthering the Association's agenda. Different levels of implementation might be categorized as

- initiation, implementation, and institutionalization, or as
- awareness, understanding, acceptance, commitment, and renewal.

In each case it was obvious that awareness-building activities, while important, can only be considered a first step in the initiation of change (Haycock, 1993); examples include articles in journals read by the target audiences and presentations at their conferences.

Similarly, the training of leaders in advocacy and implementation would need to model the elements of effective staff development—presentation of information or theory, demonstration of the change(s) sought, opportunities to practice and to gain credible feedback, and continued coaching through a combination of both pressure and support for change (Haycock, 1993).

Effective marketing of national guidelines and standards, and the development of a network of advocates and trainers, would require considerable leadership, time, and resources.

Findings

An examination of the current and recent work of the Association showed some convergence of philosophy and activity for a national implementation and advocacy plan. The Association contracted with a major marketing research firm to undertake a survey of the profession (PCI, 1996), including both members and nonmembers. This study pointed to critical needs for effective continuing education and a long-term advocacy program. The report

- affirmed the continuing education requirements of library media specialists;
- identified time and money as chief barriers to professional development;
- made suggestions for improved communications; and
- identified a need for a long-term advocacy and public relations program.

The AASL Continuing Education Plan, also completed in 1996, provided a research-based, philosophical framework for professional development activities. It specifically noted that such activities must be centered in school reform efforts directed toward standards-based education for students and teachers, must focus on improved student achievement, must be job-embedded and part of a coherent long-range plan, and must involve shared decision-making. Further, professional development activities must make best use of new technologies, model desired teaching practices, reflect research, provide time for inquiry, reflection and mentoring, and be continually assessed based on results and adjusted as needed. The primary audience was the building level library media specialist (AASL, 1998, Appendix B).

The AASL Advocacy Task Force, working in 1997, used the impending release of new national guidelines and standards as the impetus and content for a national advocacy campaign with training modeling the principles for effective staff development. They

- affirmed the concept of advocacy first to the school library community;
- supported the concept of advocacy training on national, regional and state levels;
- recognized the importance of the responsibility of the individual library media specialist;
- recognized that the decision-makers who need to be influenced are themselves, adult learners.

The Association's Implementation Task Force similarly identified the need for advocacy training in 1997 and included a number of public relations tools. They also recommended ways to involve building level library media specialists (AASL, 1998).

Other groups within AASL also had an advocacy component to their activities.

There were enormous opportunities for coordination, cooperation and strength in numbers. Equally, there was enormous potential for duplication of effort, too many messages, mixed messages and "stepping on toes" if such coordination did not occur.

The fact that advocacy was high on the list of many within AASL was in itself very positive. It meant that the membership was becoming more aware of the need for advocacy and more ready for action.

AASL was in danger, however, of getting caught in some classic communication pitfalls by:

- concentrating on "getting the message out" rather than assisting in advancing the agenda of the target audiences to be reached;
- focusing efforts on telling decision-makers how important school libraries are and about the critical role of the library media specialist, not realizing how self-serving that sounds to decision-makers;
- confusing marketing with public relations and promotion;

- spending limited resources on expensive communication tools (brochures, videos, etc.) without assessing the needs of the target group or providing measures for evaluating whether the tools actually contributed to awareness, understanding and action; and
- "dusting off" some of the successful promotional activities from the last time that *Information Power* was released (1988) without a clear understanding of how the current political and economic environment may require different tools and approaches.

Library marketing tools, techniques and models are considerably more sophisticated and more widely available than before (Weingand, 1987, 1995). More strategic marketing approaches could be taken this time around, with more carefully defined target groups.

The AASL Executive Committee took a close look at all the advocacy-related activities that were being proposed to determine if there was a congruence of purpose, a mutual understanding, and any duplication of effort. They recognized that it was not sufficient, in an era of tight resources, to have groups doing similar things merely "letting each other know what they are doing." This meant taking a close look at the role and function of each group and redefining the advocacy component. It meant that leadership and direction had to come from the Executive Committee as they took a greater role in advocacy themselves.

The AASL Executive Committee served as a "jury of expert opinion" to estimate potential for coordination and congruence and to reach consensus. Marketing specialists (Ries & Trout, 1993) suggest that the greatest marketing successes often come from "a single bold stroke", and the AASL Executive Committee did just that. They created a new structure that allowed all advocacy and related activities to be strategic, accountable, and carefully measured, using only one consistent planning model. This new structure was called the Presidential Task Force on the Implementation of the New Standards and Guidelines. The group was charged with developing the national plan as a major focus for the next five years, and resources would be identified and appropriately assigned to it. All of the other committees and task forces were disbanded.

The new Task Force was chaired by an implementation and staff development specialist (Ken Haycock), and the marketing consultant (Pat Cavill) was retained by the Association. The Task Force reflected both members with solid track records in the former committees and geographic and work environment nonprobability stratification. The Task Force used the tools of marketing research to take a systematic, objective approach to the development and provision of information for decision making regarding the specific marketing problem (the need for school library media specialists and programs). The Task Force also served as a reference group to influence individual attitudes and behaviors.

The Task Force began with the consultant delineating the differences among public relations, including promotion, and marketing and advocacy. Public relations consists of getting the library's message across: "this is who we are and what we do, this is when and where we do it and for whom..."). Marketing, on the other hand, is finding out what the customer needs: "who are you, and what do you need, how, where and when can we best deliver it to you—and what are you willing to pay?"). Advocacy involves building support and awareness incrementally over time and connecting agendas and priorities: "your agenda will be assisted by what we have to offer..."). AASL needed to focus on connecting agendas with the target audiences, e.g., school principals, to be reached rather than on simply producing

communication tools to "get the message out". It was clear that all parts of the AASL did not have the same definition of advocacy and an understanding of how it differs from marketing and public relations.

The Association had engaged the marketing consultant to work as well with the Affiliate Assembly to identify the strengths, weaknesses, threats, and opportunities in the current political and economic climate. A "summit" of representatives was held in February, 1997 with a second national session for refinement of needs, requirements, and directions in July, 1997 and with a third to respond to a draft plan in January, 1998. Specific suggestions and recommendations were incorporated in draft documents. Descriptive information emerged about markets and competition with perceptions of cause and effect. These perceptions corroborated the PCI study (1996) and were validated through personal interviews and the consultant's prior and current work with focus groups of library users and administrators. A further series of open ended questions enabled elaboration of the concerns and possibilities for participants.

The Association adopted one planning model (see Appendix A), which had been developed and successfully used by the consultant for more than 20 years (Cavill, 1984). The model enabled market segmentation and development of a separate marketing program for each group. The overall goal was to communicate effectively with decision-makers to establish a distinct place for school library media specialists in their minds, that is, to position school library media professionals as an essential fixture on the educational landscape.

Market segmentation is a marketing strategy in which a large heterogeneous market (e.g., "school principals") is broken down into small more homogeneous segments (e.g., elementary, middle or secondary school principals, at the local, state or national level), and planners develop and implement a unique marketing mix for the target segment(s). Positioning is a process in which the marketer communicates with consumers to establish a distinct place for its product or brand in their minds.

Marketing research mirrored implementation research in attitude development—from no awareness of "the product", i.e., the appropriate role of the library media specialist; to awareness of the product; to actual knowledge of the product; to liking the product; to a preference for the product, e.g., in the face of competing demands or approaches; to an intention to act on the preference; to an actual "exchange" whereby the administrator or teacher engages the library media specialist for a collaborative exchange of expertise and particular contributions (Lavidge & Steiner, 1961).

Here the "product" [library media specialists] is a combination of the features that enable library media specialists to impact student achievement and positive, collaborative work environments. The new guidelines and standards enabled the "product relaunch" to find new untapped market segments and to stimulate increased or different uses by existing customers, e.g., teachers, and the "product development," in this case effective staff development based on research and best practice in the profession, to enable library media professionals to implement the expectations articulated in the guidelines.

The resulting draft plan formulated the problem, segmented the market to ensure that all audiences were identified and a separate marketing program developed for each. It also determined "smart" objectives that were specific, measurable, active, relevant, and timed,

with clear accountability for completion. Evaluation would match objectives, rather than simply determine whether activities were completed. A single common message would be used throughout--*Information Power*: Because Student Achievement *Is* The Bottom Line.

In January, 1998 the 80-page draft plan, with more than 30 specific objectives and more than 75 target audiences, was endorsed, with some modification, by the AASL Affiliate Assembly and the AASL Board of Directors. The plan included the determination of priorities and allocation of resources and a clear delineation of responsibilities at the national, state, district and school levels. The Affiliate Assembly affirmed that the resulting plan (AASL, 1998) met their needs and responded to their requests and requirements.

Results

The marketing plan (AASL, 1998) includes more than 30 specific objectives, each with target groups, including AASL's members and non-members, strategies, timelines, communication tools and evaluation criteria and measures. Responsibilities are delineated for the national, state and local levels. For example, for school principals, AASL has responsibility for national associations such as the National Association of Secondary School Principals (see Appendix B), while state library media associations bear responsibility for their state association(s) of school principals. District coordinators and district library media associations have responsibility for school district principals, while the individual library media specialist works with the building level principal.

Objective 10 is the action plan for specific, measurable, active, relevant and timed objectives to enable work with each of the approximately 75 national teacher and library associations. The AASL planning and monitoring charts (AASL, 1999 June) provide the name of the person(s) responsible for each project, progress notes, achievements, and completion dates.

Initial successes include the first annual summer training institute for state implementation coordinators. These targets exceeded each year their objective of ten states participating in 1998 and in 1999. These coordinators develop state level plans with their associations and partner groups that are congruent with the national plan; i.e., they are on message, targeted, and consistent. The role of the state coordinator was clearly delineated (AASL, 1998), and the training institutes modeled the research in implementation and staff development (Haycock, 1993). This research enabled the Task Force to recognize and plan for each discrete phase of implementation requiring time and resources: readiness, preparation, training, implementation, and maintenance.

The plan for the National Association of Secondary School Principals (NASSP) received a boost through a cooperative arrangement of the AASL, NASSP, and the National Forum on Information Literacy, an AASL and IASL partner group. The past president of AASL was invited to guest edit a special issue of the *NASSP Bulletin*, with 44,000 secondary school principal subscribers, on information literacy and the new guidelines and standards (Haycock, 1999). It is important to note, however, that publications as a communication tool need to be reinforced and moved from awareness to action. Other successes are being identified, celebrated and built on as the marketing plan moves forward.

Descriptive studies were selected for the first phase of implementation, with information about markets and awareness- and commitment-building plans and projects. Causal studies will be undertaken in three ways: through observation, including collection of statistics of attendance and improved support; through experiment, identifying one target group with one variable and a control group; and through surveys, employing personal interviews, questionnaires, and focus groups.

Conclusion

Careful planning and marketing strategies allowed the American Association of School Librarians to increase sources of information and to report that information more clearly and consistently, to reduce error and to manage the Association's marketing program more aggressively. Clear timelines and assigned responsibility ensured implementation, and ongoing monitoring and adjusting assure relevance and effectiveness. Implementation is now underway with documented achievement of the early objectives.

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Appendix A

PLANNING MODEL

Objective:

A "smart" objective is specific, measurable, active, relevant, and timed.

Target Group(s):

An audience segmentation is very specific.
The most important audience is often the smallest (e.g., the secretary of education).

Strategies:

What?

What are the obstacles?
What will inhibit achievement?

Where?

When?

Who?

Who is going to do it?

How?

The message is *Information Power: Because Student Achievement is the Bottom Line.*

Communication Tools:

What tool(s) best suits the specific objective?

- face-to-face meeting?
- video?
- brochure?
- telephone conversation?
- a combination?

Evaluation:

Be absolutely certain that your evaluation measures match your objectives and that attitudes and behaviors were changed. How do you know? How will you use this information to revise your strategies? The objective is not simply that the activities were completed, i.e., the video was produced and people watched it.

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Appendix B

MODEL PLAN FOR ONE TARGET GROUP:

NATIONAL ASSOCIATION OF SECONDARY SCHOOL PRINCIPALS

Objective:

To introduce the guidelines and standards to the national educational and administrative organizations which will have the most influence over their implementation.

This will be a priority activity for 1998 and 1999.

One individual/group took responsibility for each national organization following the gathering of the preliminary data as outlined for the association template (AASL, 1998). This template provides specific directions for gathering information about each of 75 associations, including contact information, current executive board, publications, conferences, professional development programs, current priorities, and other useful information.

State affiliates developed similar plans for state organizations and coordinated activity at the district level.

This planning model can be used any time a national or state association or organization is targeted.

TARGET GROUP
National Association of Secondary School Principals [NASSP]

These are some of the questions to which we need answers:

- How large an organization is the NASSP?
- Where is it headquartered?
- Who is the Executive Director; who is on its Executive Board?
- Where do they meet, what time of year?
- What is its decision-making and communications structure?
- What sorts of activities does it carry out? When is the annual conference and what is its planning cycle?
- What continuing education activities does it typically sponsor?
- What have conference programs featured in the past two or three years?
- Does it do research or provide incentives for research? What are its research priorities?
- Does it have a newsletter or journal, and can we get copies from the past two or three years?
- What are the major issues?

- Where are the Executive Members from? Are any of them from places where we have strong AASL members, strong local champions or strong school library media programs? Are any of them former library media specialists, or married to them? Are any of them from places where the reverse is true? (e.g. not much school library support?)
- Have library issues featured anywhere on its agenda in the past few years?
- What collegial relationships do they have to other national associations?
- Do they have a catalog of publications? Would they distribute *Information Power?*

Much of this information is available from the associations' websites and reference works; other information can be gained through telephone calls. Individuals will need to assume responsibility for gathering this information from the various associations and move forward to develop specific and concrete plans.

Once we have answered all these questions we are ready to move into Strategies.

Strategies

What?

What are the obstacles that could get in the way of our achieving our objective? These will be very dependent on the answers we get to the above questions. If our research shows that

- a couple of the key Executive Members come from areas of strong school library programs,
- libraries have been mentioned as an emerging issue at conferences and in the newsletter,

subsequent strategies will be quite different than if our research shows that school libraries have never appeared anywhere as a concern, or the President comes from an area of the country where school libraries are in serious decline.

The obstacles we should consider will fall under the following categories:

Physical: Are the key people in NASSP in easily accessible parts of the country to AASL leaders? Who are the member leaders? What about time zones? What time commitment can AASL Executive members and staff devote to this? How much money can be spent'?

Personal: Are the members of the NASSP likely to have any negative perceptions of school library media centers or school librarians? What are they likely to know about school libraries and their role? What might their attitudes be? Do AASL leaders have any negative perceptions of NASSP that might unwittingly surface? Do they see these decision-makers as "the enemy" or as potential partners? How might partnerships advance each group's agendas?

Semantic: What are *their* buzzwords? What are the key new concepts? What educational jargon has been overused and now has a negative impact?

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Environmental: Does our association and their association have goals that conflict in any way? If we are fighting for the survival of school libraries and they don't see it as an issue, is there an "agenda gap" that has to be closed? If their job is finding new ways to finance education, how receptive are they going to be to a message asking for more support for school libraries? We must provide them with solutions to some of the problems they are addressing. If attitudes are negative toward school libraries, what would it take to change their minds'? What argument can be made that is more compelling than their need to "hang tough" in the current environment? Spend most of the planning time on these three steps:

1. Determine your objective;
2. Identify your target group (and find out everything you can about them);
3. Identify the obstacles.

People do things for *their* reasons, not yours. People pay attention to the things that *they* love and value, not to the things that *you* love and value. If you understand the priorities, agendas and passions of your target group, you will have a better idea of how to motivate them to act on your behalf. Assuredly, it is not a group of school librarians telling them how important the school librarians are. The above steps will tell you a great deal about how to proceed. In fact, the rest of the process falls into place when you have done your homework this far.

When?

Meet their schedule.

Where?

Go to their turf.

Who (will do it)?

Match people carefully for credibility.

Match members in school districts with NASSP leaders.

How? (the message)

Information Power: Because Student Achievement is *the Bottom Line*

Communication Tools

What communication tools will be most appropriate for the target group, given all of the above? One-on-one communication, if possible, is ultimately going to be the most effective. There can also be cosponsored events and programs, presentations, meetings, videos, promotional materials, new publications [new advocacy handbook? new titles in Lessons Learned series?]

Evaluation

Measurable objectives mean that activities have to be put in place to ensure that measurements are taken. If you can't measure it, you probably shouldn't be doing it.

- What questions did they ask?
- What commitments did they make?
- Whom else did they suggest that you contact?
- How much time did they give you?
- What kind of follow-up have they requested?

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